# Mitzie Gay McBride (CONS/E)

1

Atty

Case No. 01CEPR01067

Kruthers, Heather H. (for Public Guardian – Conservator/Petitioner)

(1) Second and Final Account and Report of Conservator; (2) Petition for Allowance of Compensation to Conservator and Attorney (3) and Distribution

Age: 58		PUBLIC GUARDIAN	<b>1</b> , Conse	ervator, is Petitioner.	NEEDS/PROBLEMS/COMMENTS:	
		Account period:	12/13/12	2 – 12/19/14		
Со	nt. from Aff.Sub.Wit.		Accounting Beginning POH Ending POH	- - -	\$79,686.12 \$4,932.77 \$9,444.12	
<b>✓</b>	Verified Inventory PTC		Conservator staff hours @ \$76/ @ \$96/hr.)		<b>\$3,273.44</b> (11 25.39 deputy hours	
<b>√</b>	Not.Cred.  Notice of Hrg		Attorney than allowed per	- local rul	1 / 1	
✓	Aff.Mail	w/	Bond fee	-	<b>\$232.96</b> (ok)	
	Aff.Pub. Sp.Ntc. Pers.Serv.		Costs fees)	-	<b>\$435.00</b> (filling	
	Conf. Screen Letters Duties/Supp Objections Video		subject to an LPS 12/17/14 and the managed by the	conserv refore he Public C m and th	er funds can be	
✓	Receipt CI Report 2620 Order Aff. Posting Status Rpt	n/a	longer ned termination 2. Approving second an	at the co cessary, c n; , allowin ad final c	onservatorship is no cand ordering its g and settling the account;	Reviewed by: JF Reviewed on: 02/10/15
	UCCJEA Citation FTB Notice		4. Authorizing and 5. Authorizing remaining Fresno Cou	fees and the book petition estate c unty Pub	nservator and discommissions; and fee and costs; her to distribute the of \$4,252.72 to the lic Guardian as onservatee.	Updates:  Recommendation:  File 1 - McBride

2A Wanda H. Bingham (CONS/PE)

Case No. 11CEPR00949

Atty Krause, Stephanie J. (for Randy Grace – Petitioner and Co-Trustee of Trust)

Atty Magness, Marcus D. (also for Randy Grace – Petitioner and Co-Trustee of Trust)

Atty Roberts, David A. (for Joan St. Louis – Former Conservator)

Atty Boyett, Deborah K. (Court appointed attorney for Conservatee Wanda H. Bingham)

Atty Burnside, Leigh W. (for Wells Fargo Bank, N.A. – Co-Trustee of Trust)

Petition for Appointment of Successor Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

		See petition for details.	NEEDS/PROBLEMS/
		see pennon for defails.	COMMENTS:
			Court Investigator advised rights on 10-31-14 and 11-5-14
Cont 111914,			Voting right affected
121514	1		- Need minute order.
Aff.Sub.Wit.			Note: Page B is the
✓ Verified			corresponding Petition
Inventory			for Removal of current
PTC			conservator; however,
Not.Cred.			the Order Granting Conservator Leave to
✓ Notice of			Resign as Conservator of
Hrg			the Person and Estate
✓ Aff.Mail	W		was entered 12-4-14 and
Aff.Pub.			the Court accepted Ms. St. Louis' resignation
Sp.Ntc.			as of Midnight on
Pers.Serv.			12-31-14. See also Ms.
✓ Conf.			St. Louis' Resignation filed
Screen			1-6-15.
✓ Letters			Note: A Petition for Order
✓ Duties/Supp			to Pay Attorney Fees was filed 1-15-15 by Temp.
Objections			Conservator Randy
Video	Х		Grace that is set for
Receipt			hearing on 2-19-15.
CI Report			SEE ADDITIONAL PAGES
9202			
✓ Order			
Aff. Posting			Reviewed by: skc
Status Rpt			Reviewed on: 2-10-15
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 1A - Bingham

#### Page 2

#### NEEDS/PROBLEMS/COMMENTS: The following issues remain noted:

- 1. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham. The Court may require direct notice to the Conservatee pursuant to Probate Code §§1460(b) and 1214 and Cal. Rules of Court 7.51(c).
- 2. Petitioner has filed bond of \$485,578.45; however, based on the estimated value of the estate, Examiner calculates that bond should be at least \$550,236.52, which includes cost of recovery pursuant to Probate Code \$2320(c)(4) and Cal. Rule of Court 7.207.

<u>Note</u>: The estimated value of the estate appear to be based on the accounting filed by the current conservator, which has been denied. The Court has ordered that an amended account be filed by 3-16-15.

3. The Petition at #1k requests orders related to dementia medication and placement; however, the separate Attachment Requesting Special Orders Regarding Dementia (Mandatory Judicial Council Form GC-313) was not attached to the petition or served on interested parties, and the proposed order does not specify dementia medication and placement powers.

Examiner notes that the additional medical consent and dementia medication and placement powers requested herein <u>were originally granted</u> to the original conservator, David St. Louis; however, additional orders were made pursuant to agreement reached at Court Trial on 12-6-11 and Order After Hearing Regarding Placement filed 12-13-11.

The 12-13-11 Order specifies that care providers for Byrum Bingham (now deceased) and Wanda Bingham are to be present inside the main residence 24 hours per day; that Wanda Bingham is to abide by the dietary and nutrition guidelines recommended by her treating physician, and that the keys to the automobile are to be kept in the possession of the care providers or the conservator, David St. Louis.

Examiner is not aware without extensive further review of the file whether subsequent agreements or orders were made regarding Mrs. Bingham's care and placement after Mr. Bingham's death, or after Mr. St. Louis' death. The Court may require clarification.

2B Wanda H. Bingham (CONS/PE)

Case No. 11CEPR00949

Atty Krause, Stephanie J. (for Randy Grace – Petitioner and Co-Trustee of Trust)

Atty Magness, Marcus D. (also for Randy Grace – Petitioner and Co-Trustee of Trust)

Atty Roberts, David A. (for Joan St. Louis – Conservator)

Atty Boyett, Deborah K. (Court appointed attorney for Conservatee Wanda H. Bingham)

Atty Burnside, Leigh W. (for Wells Fargo Bank, N.A. – Co-Trustee of Trust)

Petition for Removal of Conservator of Person and Estate of Wanda H. Bingham, and for Costs, Expenses and Attorney Fees

Note: The Order Granting Conservator Leave to Resign as Conservator of the Person and Estate was entered 12-4-14 and the Court accepted Ms. St. Louis' resignation as of Midnight on 12-31-14. See also Ms. St. Louis' Resignation filed 1-6-15.  Not.Cred.  Notice of Hrg  Aff.Nail w Aff.Pub. Sp.Ntc. Pers.Serv. Conf. Screen Letters Duties/Supp  Note: The Order Granting Conservator Leave to Resignation Fled 12-4-14 and the Court accepted Ms. St. Louis' resignation as of Midnight on 12-31-14. See also Ms. St. Louis' Resignation filed 1-6-15.  Notice was served or Deborah Boyett as Court appointed aftorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the Conservatee and the		See petition for details.  NEEDS/PR COMMEN	ROBLEMS/ NTS:
Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail w  Aff.Pub.  Sp.Ntc.  Conf. Screen  Letters  Duties/Supp  of Midnight on 12-31-14. See also Ms. St. Louis' Resignation filed 1-6-15.  4. Notice was served or Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the	21414	Note: The Conserval Resign as the Perso entered 1	e Order Granting ator Leave to s Conservator of on and Estate was 12-4-14 and the
PTC Not.Cred.  Notice of Hrg  Aff.Mail w Aff.Pub. Sp.Ntc. Conf. Screen Letters Duties/Supp See also Ms. St. Louis' Resignation filed 1-6-15.  4. Notice was served or Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the Current Conservator Joan St. Louis. The Court may require direct notice to the		of Atlanta	
Not.Cred.  V Notice of Hrg  V Aff.Mail W  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Notice of Hrg  4. Notice was served or Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the		See also	Ms. St. Louis'
<ul> <li>Notice of Hrg</li> <li>Aff.Mail</li> <li>Aff.Pub.</li> <li>Sp.Ntc.</li> <li>Pers.Serv.</li> <li>Conf.</li> <li>Screen</li> <li>Letters</li> <li>Duties/Supp</li> <li>4. Notice was served or Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the</li> </ul>		kesignan	ion filed 1-6-15.
Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  attorney for Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the	Notice of	4. Notice of Hrg	orah Boyett as
Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters  Duties/Supp  Conservatee Wanda Bingham, and on David Roberts as attorney for the current Conservator Joan St. Louis. The Court may require direct notice to the	Aff.Mail w	I All Mall I W I	
Sp.Ntc.   Bingham, and on   David Roberts as   attorney for the   current Conservator   Letters   Duties/Supp   Court may require   direct notice to the	Aff.Pub.		,
Conf. Screen  Letters  Duties/Supp  Court may require direct notice to the	Sp.Ntc.		
Screen  Letters  Duties/Supp  Court may require direct notice to the	Pers.Serv.		
Duties/Supp Court may require direct notice to the		Screen	ent Conservator
direct notice to the	Letters	i reliel?	
	Duties/Supp		
	Objections		
Videocurrent ConservatorReceiptpursuant to Probate			
Code §§1460(b) and	CI Report		
9202 1214 and Cal. Rules of Court 7.51(c).		Cour	
✓   Order	Order	'   Order	11 / .51 (6).
Aff. Posting Reviewed by: skc	Aff. Posting	Aff. Posting Reviewed	d by: skc
Status Rpt Reviewed on: 2-10-15	Status Rpt	1 0.0.00	d on:
UCCJEA Updates:	UCCJEA		
Citation Recommendation:		<del>                                      </del>	
FTB Notice File 1B - Bingham	FTB Notice	File 1B - B	Bingham

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Aff.Sub.Wit.  Verified Inventory PTC	= = = = = =	5. Notice was served on Deborah Boyett as Court appointed attorney for Conservatee Wanda Bingham. The Court may require direct notice to the Conservatee pursuant to Probate Code §§1460(b) and 1214 and Cal. Rules of Court 7.51(c).
Not.Cred.	=	
✓ Notice of Hrg		
✓ Aff.Mail ∨		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.	1	
Conf. Screen		
Letters		
Duties/Supp		
Objections		
Video Receipt		
CI Report		
9202		
✓ Order		
Aff. Posting	<u> </u>	Reviewed by: skc
Status Rpt		Reviewed on: 2-10-15
UCCJEA		Updates:
Citation	_	Recommendation:
FTB Notice		File 2 - Bingham

2C

Shepard, Jeff S. (for Kevin Hudgins and Danielle Dutra – Co-Executors)

Order to Show Cause RE: Failure to Appear and Failure to Filed an Account

DOD: 12/18/12	KEVIN HUDGINS and DANIELL DUTRA were	NEEDS/PROBLEMS/COMMENTS:
	appointed Co-Executors with Full IAEA without bond and Letters issued on 2-7-13.	<b>Note:</b> First & Final Report of
	bond and Letters issued on 2-7-13.	Administration and Petition for
	On 2-7-13, the Court set status hearing for the	Distribution filed 02/13/15 and
Cont. from	filing of the first account or petition for final	set for hearing on 03/25/15.
Aff.Sub.Wit.	distribution for 4-11-14.	
Verified		
Inventory	On 4-11-14, there were no appearances. Mr.	
PTC	Shepard was ordered to be personally present on 5-23-14.	
Not.Cred.		
Notice of	On 5-23-14, there were no appearances. The	
Hrg	matter was continued to 7-15-14 and Mr.	
Aff.Mail	Shepard was again ordered to be personally	
Aff.Pub.	present.	
Sp.Ntc.	On 07/15/14, Mr. Shepard appeared and the	
Pers.Serv.	status hearing was continued to 10/31/14.	
Conf.		
Screen	Status Report filed 10-20-14 (not verified)	
Letters	states there are multiple outstanding	
Duties/Supp	creditor's claims against the estate and the Co-Executors are continuing their attempt to	
Objections	arrange payment so that the estate can be	
Video	closed and distributed. Mr. Shepard	
Receipt	respectfully requests that the Court extend	
CI Report	the time for filing the first and final report of	
9202	administration.	
Order	On 10/21/14 there were no appearances	
Aff. Posting	On 10/31/14, there were no appearances and the matter was continued to 01/29/15.	Reviewed by: JF
Status Rpt		Reviewed on: 02/10/15
UCCJEA	On 01/29/15, there were no appearances.	Updates: 02/17/15 Recommendation:
Citation	Minute Order from 01/29/15 states: The Court	
FTB Notice	issues an Order to Show Cause to Jeff	File 3 - Hudgins
	Shepard, Kevin Hudgins, and Danielle Dutra	
	for failure to appear and failure to file an account. All parties are ordered to be	
	personally present in court on 02/19/15.	
	Clerk's Certificate of Mailing indicates that a	
	copy of the 01/29/15 Minute Order was	
	mailed to Jeff Shepard on 01/29/15.	

Atty McCloskey, Daniel T. (for Administrator, Joseph W. Martin)

(1) First and Final Report of Administrator on Waiver of Account and Petition for its Settlement; (2) for Allowance of Statutory and Extraordinary Fees to Attorney for Services; and (3) for Order for Final Distribution Pursuant to Probate Code 3600 et. seq.

DOD: 3/31/10		JOSEPH WILLIAM MARTIN, Administrator,	NEEDS/PROBLEMS/COMMENTS:
		is petitioner.  Accounting is waived.	Continued from 10/20/14. As of 2/10/15 the following issues remain:
√ ✓ ✓ ✓	ont. from 082514 0814, 102014  Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg	I & A - \$125,873.74 POH - \$127,424.94  Administrator - waives  Attorney - \$4,776.22  (statutory)  Attorney x/o - \$9,100.00 (40.75 hours @ \$100 - 250/hr for services in connection with the civil litigation and creation of the special needs trust)	1. It appears that the Joseph W. Martin Irrevocable Trust established on 1/16/14 is not a valid "special needs" trust. The requirements for creation of a special needs trust are that the beneficiary must be under the age of 65 at the time of the trust's creation. Mr. Martin is 86. (Title 42 United States Code section 1396p(d)(4)(A)).
✓ ✓ ✓ ✓	Aff.Mail  Aff.Pub.  Sp.Ntc.  Pers.Serv.  Conf. Screen  Letters 4/2/13  Duties/Supp  Objections  Video Receipt  CI Report  9202  Order	Costs - \$1,304.32 (probate Referee, publication, certified copies)  Petitioner states he established the JOSEPH W. MARTIN IRREVOCABLE SPECIAL NEEDS TRUST, ("SNT") dated 1/16/14, Donald Fischer, trustee. The SNT currently contains proceeds from the settlement of the civil litigation by order of the Honorable Kristi Culver-Kapetan in the matter entitled Joseph W. Martin v. Mary Quin, et. al, case no. 12CECG03130 filed on 4/2/14. Petitioner requests the court take judicial notice of the order.	<ol> <li>Petition requests the distribution to the Joseph W. Martin Irrevocable Special Needs Trust, dated 1/16/14. The trust attached to the petition is entitled the Joseph W. Martin Irrevocable Trust established on 1/16/14 with no mention of a special needs trust.</li> <li>Please see additional page</li> </ol>
	Aff. Posting	Please see additional page	Reviewed by: KT
	Status Rpt UCCJEA	ricase see additional page	Reviewed on: 2/10/15 Updates:
	Citation		Recommendation:
✓	FTB Notice		File 4A - Martin

### 4 Theresa Gutierrez Martin (Estate)

Case No. 13CEPR00054

Page 2

Petitioner request the assets of the estate be distributed to Donald E. Fischer, Trustee of the Joseph W. Martin Irrevocable Special Needs Trust dated 1/16/14.

### NEEDS/PROBLEMS/COMMENTS (cont.):

3. Extra ordinary fee requests appear to include attorney services that benefited the administrator, Joseph Martin, personally and not the estate. For instance, Mr. McCloskey states he assisted Mr. Martin in a civil case for financial elder abuse against his daughter, Mary J. Quin entitled Joseph W. Martin v Mary J. Quin, case no. 12CECG03130. The action sought to recover assets Mr. Martin alleged were fraudulently taken by his daughter, Mary J. Quin. Mr. Martin was represented by Attorney Babette Fischer in the civil matter and not Mr. McCloskey. Mr. McCloskey also states he assisted in the creation of the Special Needs Trust for Mr. Martin. The special needs trust would be solely for the benefit of Mr. Martin and not for the benefit of the estate. In addition, there are questions regarding the validity of the Special Needs Trust. It appears any attorney fees incurred by the civil case or for Mr. Martin personally should be recovered from Mr. Martin personally outside of the estate. California Rules of Court, Rule 7.702(3) requires the declarant to show the benefit of the services to the estate. - Declaration of Attorney Daniel T. McCloskey filed on 8/15/14 states he feels the extraordinary fees are justified due to the unusual circumstances presented by the case, including but not limited to; preparation, filing and related actions to create the Special Needs Trust; preparation and filing and prosecution of the Petition to Determine Title; protracted civil litigation regarding the Petition to Determine Title and Petitioner's physical incapacity and mobility issues after his fall requiring travel to and from the convalescent home and hospital; that the misconduct alleged by his daughter occurred in 2010 and that it was his only daughter, a licensed attorney, who aggressively defended against the complaint and petition.

Status Report filed on 10/10/14

Status Report filed on 2/11/15

George L. Page (Estate)

Shepard, Jeff S. (for Kevin Hudgins and Danielle Dutra – Co-Executors)

Order to Show Cause RE; Failure to Appear and Failure to File and Account

DC	D: 4-20-13	KEVIN HUDGINS and DANIELLE DUTRA	NEEDS/PROBLEMS/COMMENTS:
		were appointed as Co-Executors with	
		Full IAEA without bond on 8-29-13.	Note: First & Final Report of
		=	Administration and Petition for
Co	nt. from	Letters issued on 9-4-13.	Distribution filed 02/13/15 and set for hearing on 03/25/15.
	Aff.Sub.Wit.	At the hearing on 8-29-13, the Court set	110diii1g 011 03/23/13.
	Verified	a status hearing on 10/31/14 for the	
	Inventory	filing of the first account or petition for final distribution.	
	PTC		
	Not.Cred.	Status Report (unverified) filed 10-21-14	
	Notice of	states the first and final account is in the	
	Hrg	process of being prepared for filing.	
	Aff.Mail	Due to the complexities involved in this	
	Aff.Pub.	estate and the companion estate of the decedent's daughter, Victoria L.	
	Sp.Ntc.	Hudgins, together with the obligation of	
	Pers.Serv.	owning and operating Page Funeral	
	Conf.	Chapel in Selma, the Executors have	
	Screen	limited time to deal with matters of the	
	Letters	estate. The attorney respectfully	
	Duties/Supp	requests that the Court extend the time for filing the first and final account.	
	Objections	=	
	Video	On 10/31/14, there were no	
	Receipt	appearances and the status hearing	
	CI Report	was continued to 01/29/15.	
_	9202	On 01/20/15 there were no	
	Order	On 01/29/15, there were no appearances. <b>Minute Order from</b>	Parisonal Iron IF
	Aff. Posting Status Rpt	01/29/15 states: The Court issues an	Reviewed by: JF Reviewed on: 02/10/15
	UCCJEA	Order to Show Cause to Jeff Shepard,	Updates: 02/17/15
	Citation	Kevin Hudgins, and Danielle Dutra for	Recommendation:
	FTB Notice	failure to appear and failure to file an	File 5 - Page
	FIB NOICE	account. All parties are ordered to be	File 5 - rage
		personally present in court on 02/09/15.	
		Clerk's Certificate of Mailing states that a copy of the 01/29/15 Minute Order	
		was mailed to Jeff Shepard on	
		01/29/15.	
<u> </u>		10.7=.7.0	

# Thomas Matthew Jeffrey (CONS/E)

Case No. 13CEPR00682

Atty Smith, Jane T. Atty Helon, Marvin T

(1) First Account Current and Report of Conservator and (2) Petition for Allowance of Compensation to Conservator and Attorney

	or Compensation to Conservator and Attor	
Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		CONTINUED TO 3-11-15
Cont. from		Per request of County Counsel
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by:
Status Rpt		Reviewed on: 2-11-15
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 6 - Jeffrey

6

Calhoun, Ronald L (for Louise Baker – Executor)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 05/17/2013			
	nt. from 06061 0114, 081915	4,	
	Aff.Sub.Wit.		
	Verified		
	Inventory		
	PTC		
	Not.Cred.		
	Notice of		
	Hrg		
	Aff.Mail		
	Aff.Pub.		
	Sp.Ntc.		
	Pers.Serv.		
	Conf.		
	Screen		
	Letters		
	Duties/Supp		
	Objections		
	Video		
	Receipt		
	CI Report		
	9202		
	Order		
	Aff. Posting		
	Status Rpt		
	UCCJEA		
	Citation		
	FTB Notice		

**LOUISE BAKER,** was appointed Executor with full IAEA authority without bond on 01/27/2014.

Letters issued on 01/28/2014.

Minute Order of 01/06/2014 set this status hearing for the filing of the Inventory and Appraisal.

Former Status Report filed 08/11/2014 states Attorney Calhoun failed to transfer over the hearing of 07/01/2014 due to a change in his calendaring. He and the executrix, Louise Baker, have done an extensive search and found that the estate has no property. However, on review of the events leading up to and during the investigation, it was determined that an individual had changed the beneficiary of the decedent's lie insurance three days before her death. The case number of the probate has been used in discovery attempts to determine how such action was taken. As can be seen by the decedent's death certificate, Ms. Ello was in the hospital, and had been for over a month prior to her death. Therefore, with the changing of her beneficiary, it does not appear proper.

#### **NEEDS/PROBLEMS/COMMENTS:**

Minute Order of 08/19/2014: Estate appears to be without assets except for allegations of life insurance proceeds. Beneficiary was changed online days before Ms. Ello's death.

 Need Inventory and Appraisal or current written status report pursuant to Local Rule 7.5 which states in all matters set for status hearing verified status reports must be filed no later than 10 days before the hearing. Status Reports must comply with the applicable code requirements. Notice of the status hearing, together with a copy of the Status Report shall be served on all necessary parties.

**Note:** Status Hearing for the filing of the First Account or Final Distribution is set for 03/06/2015 per minute order of 01/06/2014.

Reviewed by: LV		
<b>Reviewed on:</b> 02/11/2015		
Updates:		
Recommendation:		
File 7 - Ello		

Atty

# Krause Cota, Stephanie J (for Petitioners/Executors Pamela J. Stevenson & Emma Rae Hansen)

(1) First and Final Account and Report of Co-Executors and (2) Petition for Its Settlement, for (3) Confirmation and Approval of Acts of Co-Executors, for (4) Allowance of Compensation to Co-Executors for Ordinary Services, for (5) Allowance of Compensation to Attorneys for Ordinary and Extraordinary Services, and for (6) Final Distribution

DOD: 1/22/2014		PAMELA J. STEVENSON and EMMA RAE HANSEN, Co-Executors, are petitioners.  NEEDS/PROBLEMS/COMMENTS:
		Account period: 1/22/14 - 12/26/14
Co	Aff.Sub.Wit.	Accounting - \$288,701.08 Beginning POH - \$251,838.68 Ending POH - \$183,651.38
✓ ✓	Inventory PTC	Executors - <b>\$8,774.03</b> (statutory, \$4,387.02 each)
√ √	Not.Cred.  Notice of   W/	Attorney - <b>\$8,774.03</b> (statutory)
✓	Aff.Mail  Aff.Pub.	Attorney X/O - \$2,512.50 (for sale of real property, 11.50 hrs @ \$125-\$250 per hour)
	Sp.Ntc. Pers.Serv.	Costs - \$173.74 (probate referee)
<b>√</b>	Conf. Screen  Letters 3/21/14	
	Objections Video	Distribution, pursuant to Decedent's Will, is to:
	Receipt CI Report	Emma Rae Hansen - \$40,100.00 DaDeen Creed - \$40,100.00 Marta Peterson - \$16,040.00
✓ ✓	9202 Order	Brent H. Nay - \$16,040.00 Jill Gourley - \$16,040.00
	Aff. Posting Status Rpt UCCJEA	Deena Nay - \$16,040.00
<b>✓</b>	Citation FTB Notice	Recommendation: File 8 - Nay

# 9 Barbara Skopec (Cons/PE)

Case No.

14CEPR01082

Atty

Rindlisbacher, Curtis D. (for Paul Carreiro and Donna Carreiro – sister & brother-in-law/Petitioners)

Petition for Appointment of Probate Conservator of the Person and Estate (Prob. C. 1820, 1821, 2680-2682)

Age: 59		NO TEMPORARY REQUESTED	NEEDS/PROBLEMS/COMMENTS:
	ont. from 011515  Aff.Sub.Wit.  Verified  Inventory  PTC  Not.Cred.  Notice of Hrg  Aff.Mail W/  Aff.Pub.  Sp.Ntc.  Pers.Serv. W/  Conf. Screen  Letters X  Duties/Supp n/a  Objections  Video Receipt  CI Report  9202  Order  Aff. Posting  Status Rpt  UCCJEA  Citation  FTB Notice	DONNA CARREIRO and PAUL CARREIRO, sister and brother-in-law, are Petitioners and request that the PUBLIC GUARDIAN be appointed as Conservator of the Person and Estate without bond.  Estimated Value of the Estate: Personal property - \$2,500.00  Petitioners state that the proposed conservatee suffers from mental health issues and is unable to keep her home properly clean and in a liveable state. Petitioners believe that the proposed conservatee's health is good other than her mental health issues. Petitioner state that the proposed conservatee will not seek help for her mental health problems and refuses to take the medication that is prescribed to her due to irrational beliefs. The proposed conservatee lives alone in a home presently owned by her father's trust, she is also the beneficiary of her father's	CONTINUED FROM 01/15/15 Minute Order from 1/15/15 states: Counsel requests to bifurcate the issue of person and estate. Ms. Kruthers requests time to see if a probate conservatorship is appropriate. The Petition is granted as to the estate ONLY. Matter is continued to 02/09/15 as to the person ONLY. Mr. Rindlisbacher will submit a new order.  Proposed Conservatee has not been advised of her rights.  Letters of Conservatorship of the Estate issued on 02/03/15.  Reviewed by: JF  Reviewed on: 02/10/15  Updates: Recommendation:  File 9 - Skopec

Atty

Cook, Camille K.

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

Age:		NEEDS/PROBLEMS/COMMENTS:
DOD:		
		OFF CALENDAR. Calendared in
		Error. Hearing scheduled for 2/18/15
Cont. from		
Aff.Sub.Wit.		
Verified		
Inventory		
PTC		
Not.Cred.		
Notice of Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters		
Duties/Supp		
Objections		
Video		
Receipt  CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed by: K1
UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 10 - Lopez

10

11 Atty John Bone (Spousal)

Amador, Catherine A. (for Starling Bone – Surviving Spouse – Petitioner)

Spousal or Domestic Partner Property Petition (Prob. C. 13650)

DOD: 6-12-06			STARLING BONE, Surviving Spouse, is	NE	EEDS/PROBLEMS/COMMENTS:
			Petitioner.  No other proceedings	1.	The original will has not been deposited with the Court pursuant
	nt. from 02031				to Probate Code §8200.
<u> </u>	Aff.Sub.Wit.	<u>၁</u>	Will dated 7-7-04 devises entire estate	١,	Datitionar dags not provide any
			to Petitioner.	<b> </b> 2.	Petitioner does not provide any information regarding her
Ě	Verified		Petitioner requests Court determination		marriage to the decedent and
	Inventory		that the decedent's 50% community		acquisition of the real property in
	PTC		property interest in real property		order for the Court to confirm her
.4	Not.Cred.		located at 210 N. H Street in Fresno		50% community property interest
~	Notice of Hrg		passes to her pursuant to Decedent's will, and confirmation that Petitioner's		in the real property. The Court may require a verified
	Aff.Mail	W	50% community property interest in the		declaration containing this
Ě	Aff.Pub.	VV	real property belongs to her.		information.
	Sp.Ntc.		,		
	Pers.Serv.				
	Conf.				
	Screen				
	Letters				
	Duties/Supp				
	Objections				
	Video				
	Receipt				
	CI Report				
	9202				
~	Order				
	Aff. Posting			Re	eviewed by: skc
	Status Rpt			Re	viewed on: 2-10-15
	UCCJEA			_	odates:
	Citation				commendation:
	FTB Notice			File	e 11 - Bone
					11

12

Atty

Case No. 15CEPR00005

In Re: Palmquist Family Trust (Trust)

Case No. 15CE

Motsenbocker, Gary L (for Petitioners Gregory Palmquist and Karen Nazaroff)

Petition to Confirm Real Properties as Assets of Trust

		GREGORY PALMQUIST and KAREN NAZAROFF,	NEEDS/PROBLEMS/COMMENTS:
		Successor Trustees, are petitioners.	
		Please see petition for details.	
Cont. from		Declaration of Petitioners filed on 2/17/15.	
Aff.Sub.Wit.		, , ,	
√ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
√ Aff.Mail	W/		
Aff.Pub.			
Sp.Ntc.			
Pers.Serv.			
Conf. Screen			
Letters			
Duties/Supp			
Objections			
Video Receipt			
CI Report			
9202			
✓ Order			
Aff. Posting			Reviewed by: KT
Status Rpt			Reviewed on: 2/11/15
UCCJEA			Updates:
Citation			Recommendation:
FTB Notice			File 12 - Palmquist

In Re: Strum Family Trust (Trust)

Dowling, Michael D. (for Donald Strum – Trustee – Petitioner)

Petition for Order Approving Modification of Trust Terms

			See petition for details.	NEEDS/PROBLEMS/ COMMENTS:
	Aff.Sub.Wit.			
~	Verified			
	Inventory			
	PTC			
	Not.Cred.			
<b>\</b>	Notice of			
	Hrg			
~	Aff.Mail	W		
	Aff.Pub.			
	Sp.Ntc.			
	Pers.Serv.			
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report			
	9202			
~	Order			<u> </u>
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 2-11-15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 13 - Strum

14 Atty

Shehadey, Vanessa Lynn (for Craig Costi – Petitioner – Brother)

Petition for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 11/28/2014	i	CRAIG COSTI, brother is	•	NEEDS/PROBLEMS/COMMENTS:
			requests appointment of with bond fixed at \$100		Need Affidavit of Publication.
Со	nt. from	1	Receipt of Bond filed in \$100,000.00 on 01/26/20		Petitioner is not listed on #8 of the petition as required.
<b>√</b>	Aff.Sub.Wit. Verified		Full IAEA - ?		<b>Note:</b> Since the Receipt of Bond was
	Inventory PTC		Decedent died intestat	re	filed no Status Hearing was provided for the filing of the Receipt of Bond.
<b>✓</b>	Not.Cred. Notice of		Residence: Kingsburg Publication: Need		
<b>√</b>	Hrg Aff.Mail	w/	Estimated value of the I Personal property -	Estate \$2,000.00	Note: If the petition is granted status hearings will be set as follows:
	Aff.Pub. Sp.Ntc.	Х	Real property - Total -	\$91,000.00 <b>\$93,000.00</b>	• Thursday, 06/18/2015 at 9:00a.m. in Dept. 303 for the filing
	Pers.Serv. Conf.		Probate Referee: Rick S	mith	of the inventory and appraisal and
<b>✓</b>	Screen Letters				• Thursday, 04/21/2016 at 9:00a.m. in Dept. 303 for the filing
<b>✓</b>	Duties/Supp				of the first account and final distribution.
	Objections Video				Pursuant to Local Rule 7.5 if the required
	Receipt				documents are filed 10 days prior to the hearings on the matter the status hearing
	CI Report				will come off calendar and no
	9202				appearance will be required.
✓	Order				
	Aff. Posting				Reviewed by: LV
	Status Rpt				Reviewed on: 02/11/2015
	UCCJEA				Updates:
	Citation FTB Notice				Recommendation: File 14 - Costi

Burnside, Leigh W (for Susan Turner – Petitioner – Daughter)

Petition for Probate of Will and for Letters of Administration; Authorization to Administer Under IAEA (Prob. C. 8002, 10450)

DC	D: 07/10/2014		SUSAN TURNER, daughter is petitioner and	NEEDS/PROBLEMS/COMMENTS:
			requests appointment as Administrator	
			without bond.	Proposed personal representative is
				a resident of Colorado. Probate
	nt. from		Petitioner is a resident of Craig, Colorado.	Code § 8571 states notwithstanding
				a waiver of bond, the court in its
	Aff.Sub.Wit.		All heirs waive bond.	discretion may require a nonresident
✓	Verified		Full IAEA – o.k.	personal representative to give a bond in an amount determined by
	Inventory		TOILIALA - O.K.	the court.
	PTC		Decedent died intestate.	ine coon.
	Not.Cred.		Booodorn Groot in restate.	Note: If the petition is granted status
	Notice of		Residence: Fresno	hearings will be set as follows:
✓	Hrg		Publication: The Business Journal	-
H	Aff.Mail	\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\		• Thursday, 03/19/2015 at 9:00am
✓	All./Mall	w/	Estimated value of the Estate	in Dept. 303 for the filing of the
✓	Aff.Pub.		Personal property - \$12,000.00 Real property - \$215,000.00	Bond.
	Sp.Ntc.		Less encumbrances -\$96,577.00	Thursday, 06/18/2015 at 9:00a.m.
	Pers.Serv.		Total - \$243,423.00	in Dept. 303 for the filing of the
	Conf.		Ψ= 10, 1=0100	inventory and appraisal <b>and</b>
	Screen		Probate Referee: Steven Diebert	• Thursday, 04/21/2016 at
/	Letters			9:00a.m. in Dept. 303 for the filing
Ě				of the first account and final
✓	Duties/Supp			distribution.
	Objections			
	Video			Pursuant to Local Rule 7.5 if the required
	Receipt			documents are filed 10 days prior to the
	CI Report			hearings on the matter the status hearing
	9202			will come off calendar and no
1	Order			appearance will be required.
`	0.00.			
	Aff. Posting			Reviewed by: LV
	Status Rpt			<b>Reviewed on:</b> 02/11/2015
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 15 - Melville
		•		

Hackett, Kyle S. (for Executor Patricia Curry-Taylor)

Probate Status Hearing RE: Filing of the First Account or Petition for Final Distribution

DOD: 5/3/2001	PATRICIA CURRY-TAYLOR was	NEEDS/PROBLEMS/COMMENTS:
	appointed Executor with full IAEA and	
	without bond on 7/18/2006.	1. Need first account, petition for
		final distribution or current written
0 17	Letters issued on 7/18/2006.	status report pursuant to Local
Cont. from		Rule 7.5 which states in all matters
Aff.Sub.Wit.	First account or petition for final	set for status hearing verified
Verified	distribution was due September 2007.	status reports must be filed no
Inventory	Inventory and Appraisal, partial no. 1.	later than 10 days before the hearing. Status Reports must
PTC	Filed on 9/4/14 show a value of	comply with the applicable code
Not.Cred.	\$140,034.22.	requirements. Notice of the status
Notice of		hearing, together with a copy of
Hrg	Inventory and Appraisal, final, filed on	the Status Report shall be served
Aff.Mail	12/4/14 shows a value of \$165,768.59.	on all necessary parties.
Aff.Pub.	Minute Order dated 1/15/15 (Order to	
Sp.Ntc.	Minute Order dated 1/15/15 (Order to Show Cause Hearing) states the Court	
Pers.Serv.	orders that parties have 30 days to get	
Conf.	the proper petition filed. If it is not filed	
Screen	at least 2 court days prior to 2/19/15,	
Letters	the Mr. Hackett and Ms. Curry-Taylor	
Duties/Supp	are both ordered to be personally	
Objections	present in court on 2/19/15. Ms. Curry- Taylor is admonished that it is her	
Video	responsibility to move the estate along	
Receipt	towards closure, and that she could be	
CI Report	removed and/or held financially	
9202	responsible.	
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 2/11/15
UCCJEA	_	Updates:
Citation	_	Recommendation:
FTB Notice		File 16 - Hollier

Steven Dwight Blue (Estate)
Chester, Bruce C (for Administrator Glen R. Blue)

Status Hearing Re: Filing of the Inventory and Appraisal

DOD: 5/8/14	GLEN R. BLUE was appointed	NEEDS/PROBLEMS/COMMENTS:
	Administrator with full IAEA authority	
	and without bond on 10/9/14.	
	-	OFF CALENDAR. Inventory and
Cont. from	Letters issued on 10/9/14.	Appraisal filed on 2/11/15.
Aff.Sub.Wit.	Minute order dated 10/9/14 set this	
Verified	status hearing for the filing of the	
Inventory	inventory and appraisal.	
PTC		
Not.Cred.		
Notice of		
Hrg		
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf.		
Screen		
Letters	 	
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order		
Aff. Posting		Reviewed by: KT
Status Rpt		Reviewed on: 2/11/15
UCCJEA		<b>Updates:</b> 2/17/15
Citation		Recommendation:
FTB Notice		File 17 - Blue

Esmeralda B. Mendez (GUARD/E) Chavez, Maria Araceli (Pro Per – Mother – Guardian) Second Accounting

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
		Note: Page 19 is a related case.
Cont from 082114, 100914, 111314, 010815		Minute Order 1-8-15: Esmeralda Mendez is sworn to interpret in the Spanish language. The Notice of Hearing was filed on 12-3-14 and the petition is orally verified in open court. The Court orders Ms.
Aff.Sub.Wit.		Chavez to pay the filing fees
✓ Verified		owed and submit an order for the accounting. Cont. to 2-19-15 at
Inventory		9:00 am in Dept. 303.
PTC Not.Cred.	-	Note: As of 2-10-15, an order has not been submitted.
V Notice of Hrg		Need Order.
Aff.Mail		
Aff.Pub.		
Sp.Ntc.		
Pers.Serv.		
Conf. Screen		
Letters	7	
Duties/Supp	=	
Objections	7	
Video Receipt		
CI Report	=	
9202	╡	
Order		
Aff. Posting		Reviewed by: skc
Status Rpt		Reviewed on: 2-10-15
UCCJEA	<u> </u>	Updates:
Citation		Recommendation:
FTB Notice		File 18 – Mendez

Second Accounting

	See petition for details.	NEEDS/PROBLEMS/COMMENTS:
	see pennon for derails.	NEEDS/TROBLEMS/COMMENTS.
		Diamas assayaladad agas an
		Please see related case on page 18.
Cont. from 082114,		page 10.
100914, 111314,		Minute Order 1-8-15:
010815		Esmeralda Mendez is sworn to
Aff.Sub.Wit.		interpret in the Spanish language. The Notice of
✓ Verified		Hearing was filed on 12-3-14
Inventory		and the petition is orally
PTC		verified in open court. The
Not.Cred.		Court orders Ms. Chavez to pay the filing fees owed and
		submit an order for the
✓ Notice of Hrg		accounting. Cont. to 2-19-15
Aff.Mail		at 9:00 am in Dept. 303.
Aff.Pub.		Note: As of 2-10-15, an order
		has not been submitted.
Sp.Ntc.		
Pers.Serv.		2. Need Order.
Conf. Screen		Note: The Court will set a status
Letters		hearing for the filing of the
		next account as appropriate.
Duties/Supp		
Objections		
Video		
Receipt		
CI Report		
9202		
Order X		Poviowed by: ske
Aff. Posting		Reviewed by: skc Reviewed on: 2-10-15
Status Rpt UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 19 - Chavez
1 ID HOICE		10

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
				Note: This petition pertains to the minor Paige only. Pedro Luna, Maternal Grandfather, was appointed Guardian of the minor Bailee on 4-2-14.
				1. Need Notice of Hearing (Form GC-020).
	Aff.Sub.Wit.			2. Need proof of service of Notice of Hearing
>	Verified			pursuant to Probate Code §1460(b)(5) <u>or</u> consent and waiver of notice <u>or</u> declaration of
	Inventory			due diligence on:
	PTC			- Paige Liggett (Minor, 14)
	Not.Cred.			- Jon Liggett (Father) - Rosa Luna (Mother)
	Notice of Hrg	X		3. Proof of Service filed 2-6-15 indicates that Pedro
	Aff.Mail	Χ		Luna, maternal grandfather and guardian of this minor's sibling Bailee, was personally served by
	Aff.Pub.			the sheriff; however, the Notice of Hearing
	Sp.Ntc.			mandatory form has not been filed. The Court
>	Pers.Serv.	W		may require clarification.
	Conf.			
	Screen			
	Letters			
	Duties/Supp			
	Objections			
	Video			
	Receipt			
<u> </u>	CI Report	Χ		
-	9202			
Ě	Order			Reviewed by: skc
	Aff. Posting Status Rpt			Reviewed by: SRC  Reviewed on: 2-11-15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 20 - Liggett
<u> </u>	1			

20

# Jerson Jacob Silva, Andrew Silva, Case No. 14CEPR00322 Rosa Lilia Gonzalez, and Cindy Marissa Gonzalez (GUARD/P)

Atty Gonzalez, Lilia (Pro Per – Paternal Grandmother – Petitioner)

Atty Figueroa, Sofia Carrillo (Pro Per – Maternal Grandmother – Guardian)

Petition for Visitation

			Petition for Visitation	
			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
Co	nt from 010815 Aff.Sub.Wit. Verified Inventory			Minute Order 1-8-15: Lupe Mendez is sworn to interpret in the Spanish language; Ms. Gonzalez is advised to bring her own interpreter to the next hearing. The Court orders the Court Investigator to check on the welfare of the minors and provide the paperwork regarding
	PTC			this hearing to the guardian.
	Not.Cred.			Cont. to 021915 900 303.
	Notice of Hrg	X		Note: As of 2-10-15, nothing further has been filed.
	Aff.Mail			ionner nas been mea.
	Aff.Pub.			Petitioner filed a declaration
	Sp.Ntc.			of due diligence regarding
	Pers.Serv.			the guardian. The Court may require further diligence for
	Conf. Screen			notice of hearing to be served.
	Letters			
	Duties/Supp			
	Objections			
	Video Receipt			
	CI Report			
	9202			
	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			<b>Reviewed on:</b> 2-10-15
	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 21 – Silva & Gonzalez

21

Rauls, Jamie L. Harris (Pro Per – Petitioner – Maternal Aunt)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

	TEMPORARY DENIED 09/09/2014	NEEDS/PROBLEMS/COMMENTS:
Cont. from 102814, 121814	Please see petition for details.	Minute Order of 12/18/2014: Examiner notes are provided to the petitioner. Mr. Todd objects to the petition. Mr. Todd is directed to file written objections.
Aff.Sub.Wit.		No written objections have been filed.
✓ Verified		The fellowing issues remarks
Inventory		The following issues remain:
PTC		1. Need proof of personal service fifteen (15)
Not.Cred.  ✓ Notice of Hrg		days prior to the hearing of the Notice of Hearing along with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or declaration of due
Aff.Mail X		diligence for:  • Devron Todd (Father)
Aff.Pub.		<b>Note:</b> Personally served on 12/11/2014 only 7 days
Sp.Ntc.  ✓ Pers.Serv.		prior to the Court hearing and not the required 15 days prior to the hearing.
Conf. Screen		<ul><li>Devine Blessing Todd (Minor)</li><li>2. Need proof of service fifteen (15) days prior to</li></ul>
✓ Letters		the hearing of the Notice of Hearing along
✓ Duties/Supp		with a copy of the Petition for Appointment of Guardian or consent and waiver of notice or
Objections		declaration of due diligence for:
Video Receipt		<ul> <li>Michael Todd (Paternal Grandfather)</li> <li>Dorthea Ross (Paternal Grandmother)</li> <li>Willie Lee Harris (Maternal</li> </ul>
CI Report		Grandfather)
9202		<ul> <li>Benona Gardner (Maternal Grandmother)</li> </ul>
√ Order		Siblings over 12 years of age
		3. Page #5 of the Guardianship Petition – Child Information Attachment (GC 210(CA)) which pertains to whether the child has Native American Ancestry was not completed.  Need declaration with page #5 attached.
Aff. Posting		Reviewed by: LV
Status Rpt		Reviewed on: 02/11/2015
✓ UCCJEA		Updates:
Citation		Recommendation:
FTB Notice		File 22 – Todd

Chagoya, Phillip (Pro Per – Petitioner – Grandson)

Petition to Determine Succession to Real Property (Prob. C. 13151)

<b>D</b>	Perilion to Determine Succession to Real Property (Prob. C. 13151)					
DC	D: 06/01/2011		JOHN I. CHAGOYA, son, and PHILLIP	NEEDS/PROBLEMS/COMMENTS:		
			CHAGOYA, grandson, are petitioners.			
			40 days since DOD			
			10 00,3 311 100 000			
	nt. from 101414	١,	No other proceedings			
111	314, 010815		,			
	Aff.Sub.Wit.		I&A - <b>\$60,000.00</b>			
✓	Verified		Will dated: 01/29/1999 devises all property,			
<b>√</b>	Inventory		both real and personal, to John I Chagoya			
	PTC		and Phillip Chagoya in equal shares.			
	Not.Cred.		Datition are required Count statements which			
<b>/</b>	Notice of		Petitioners request Court determination that decedent's 100% interest in real property			
	Hrg		located at 1085 South Hope Reedley,			
✓	Aff.Mail	w/	California pass to John I Chagoya and Phillip			
	Aff.Pub.		Chagoya in equal shares pursuant to decedent's will.			
	Sp.Ntc.		decedent s will.			
	Pers.Serv.					
	Conf.					
	Screen					
	Letters					
	Duties/Supp					
	Objections					
	Video					
	Receipt					
	CI Report					
	9202					
✓	Order					
	Aff. Posting			Reviewed by: LV		
	Status Rpt			<b>Reviewed on:</b> 02/11/2015		
	UCCJEA			Updates:		
	Citation			Recommendation: Submitted		
	FTB Notice			File 23 - Chagoya		

24 Chrissy Scott & Rebecca Scott (GUARD/P)

Case No. 14CEPR00993

Atty Shambouger, Shawna (Pro Per – Petitioner – Maternal Aunt)
Atty Shambourger, Eric (Pro Per – Petitioner – Maternal Uncle)

Atty

Scott, Andrew (Pro Per – Petitioner – Maternal Grandfather)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

		TEMPORARY EXPIRES 02/19/2015	NEEDS/PROBLEMS/COMMENTS:
Co	ont. from 010815	Please see petition for details	Minute Order of 01/08/2015: Examiner notes handed in open court; matter continued to allow the defects to be cured.
	Aff.Sub.Wit.		Need proof of service
✓	Verified		fifteen (15) days prior to
	Inventory		the hearing of the Notice
<b>—</b>	PTC		of Hearing along with a
┡	Not.Cred.		copy of the Petition for Appointment of Guardian
	Notice of X		or consent and waiver of
	Aff.Mail ×		notice or declaration of
	Aff.Pub.		due diligence for:  • Paternal
	Sp.Ntc.		Grandparents
	Pers.Serv. n/a		(Unknown)
1	Conf.		<b>Note:</b> proof of service by mail
	Screen		was served on Gary Keith Burkard and Melvena Lockyer
✓	Letters		on 01/26/2015 however it is
✓	Duties/Supp		unclear who these individuals are.
	Objections		GIO.
	Video		
<b> </b>	Receipt		
✓	CI Report		
	9202		
✓	Order		
	Aff. Posting		Reviewed by: LV
	Status Rpt		<b>Reviewed on:</b> 02/11/2015
✓	UCCJEA		Updates:
	Citation		Recommendation:
	FTB Notice		File 24 - Scott

Young, Kellie Ann (pro per Petitioner/maternal grandmother)

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			TEMPORARY EXPIRES 2/19/15	NEEDS/PROBLEMS/COMMENTS:
-				THE ESSAT ROSEEMS, COMMENTS.
			<b>KELLIE A. YOUNG,</b> maternal grandmother, is petitioner.	Need Notice of Hearing.
			Please see petition for details.	2. Need proof of personal
Со	nt. from		ricuse see permenter details.	service of the Notice of
	Aff.Sub.Wit.			Hearing along with a copy
✓	Verified		Court Investigator Report filed on 2/11/15	of the Petition, or Consent and Waiver of Notice or
	Inventory			Declaration of Due
	PTC			Diligence on:
	Not.Cred.			a. Shyawn Williams
	Notice of	Χ		(mother)
	Hrg			3. Need proof of service of
	Aff.Mail	Χ		the Notice of Hearing
	Aff.Pub.			along with a copy of the
	Sp.Ntc.			Petition, or Consent and
	Pers.Serv.	Χ		Waiver of Notice or
✓	Conf.			Declaration of Due Diligence on:
-	Screen			a. Paternal grandparents
✓	Letters			b. Vershon Williams
✓	Duties/Supp			(maternal grandfather)
	Objections			
	Video			
	Receipt			
✓	CI Report			
	9202			
✓	Order			
	Aff. Posting			Reviewed by: KT
	Status Rpt			Reviewed on: 2/11/15
✓	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 25 - Henderson
				0.5

Miramontes-Staggs, Jaclyn Ashley

Petition for Appointment of Guardian of the Person (Prob. C. 1510)

			See petition for details.	NEEDS/PROBLEMS/COMMENTS:
-			see pennon for defails.	NEEDS/TROBLEMS/COMMENTS.
				Pursuant to Proof of Service filed 2-11-15, the mother was served with Notice of Hearing, but without a copy of the
	Aff.Sub.Wit.			petition. The Court may
~	Verified			require further service.
	Inventory			2. Notice of Hearing filed
	PTC			2-11-15 includes service on
	Not.Cred.			someone named Jack Lilles,
~	Notice of			but it is unclear from the file
	Hrg			who this person is. Is this the
	Aff.Mail			maternal grandfather?
	Aff.Pub.			Note: The minute order of
	Sp.Ntc.			1-6-15 indicates that someone
~	Pers.Serv.	W		named Lawrence Buckner
<b> </b>   ~	Conf.			was present, but it is unclear
	Screen			from the file who this person is.
~	Letters			
~	Duties/Supp			
	Objections			
	Video			
	Receipt			
	CI Report	Χ		
	9202			
~	Order			
	Aff. Posting			Reviewed by: skc
	Status Rpt			Reviewed on: 2-11-15
~	UCCJEA			Updates:
	Citation			Recommendation:
	FTB Notice			File 26 - Austin

26

Atty Atty Bagdasarian, Gary G. (for Michelle Ann Torres – Daughter – Petitioner)

Horton, Lisa (Court appointed for proposed Conservatee)

Petition for Appointment of Temporary Conservatorship of the Person

		See petition for details.	NEEDS/PROBLEMS/COMMENTS:
			Court Investigator advised rights on 2-10-15.
Aff.Sub.Wit.			
✓ Verified			
Inventory			
PTC			
Not.Cred.			
✓ Notice of Hrg			
✓ Aff.Mail	W		
Aff.Pub.			
Sp.Ntc.			
✓ Pers.Serv.	W		
✓ Conf.			
Screen			
✓ Letters			
✓ Duties/Supp			
Objections			
Video			
Receipt			
✓ CI Report			
9202			
✓ Order			
Aff. Posting			Reviewed by: skc
Status Rpt			<b>Reviewed on:</b> 2-11-15
UCCJEA			Updates: 2-17-15
Citation			Recommendation:
FTB Notice			File 27 - Hernandez